OPERATIONAL SERVICES DIVISION

Job Aid:

How to Create an RPA Release Requisition

This Job Aid shows how to:

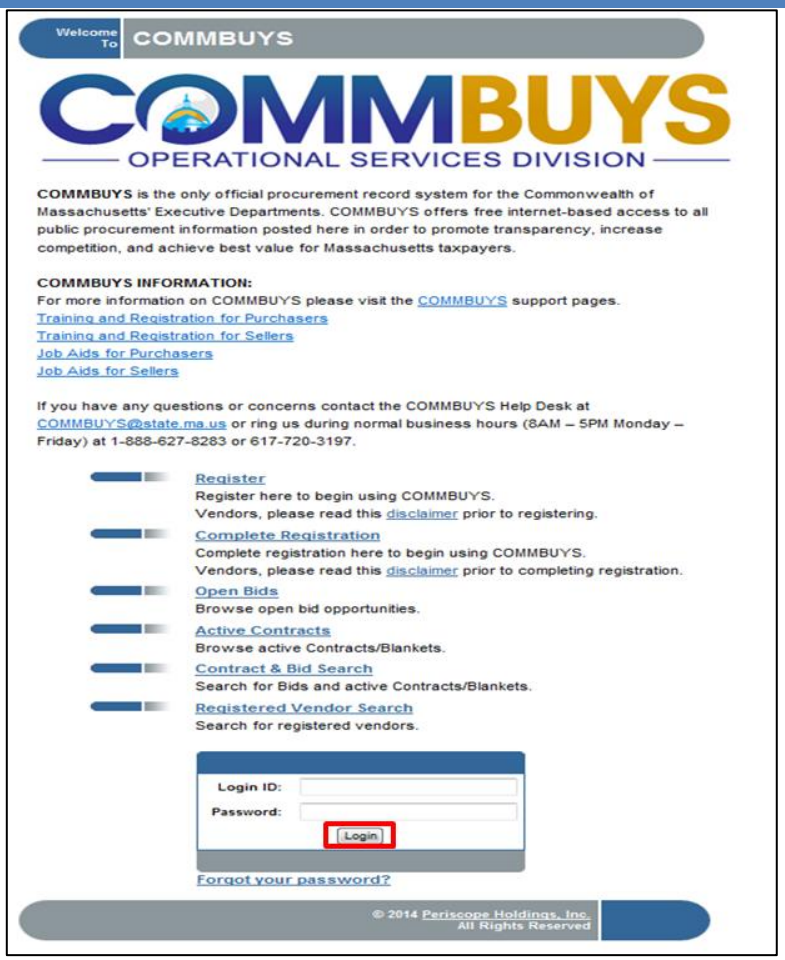
- Create an RPA Release Requisition in COMMBUYS
- Convert RPA Release Requisition to a Release Purchase Order

Of Special Note:

A Request for Payment Authorization (RPA) Release is a document in COMMBUYS used to document a contract purchase that has taken place or to request funds for a product that has already been purchased, or services that have already been provided. Once approved, the RPA Release Requisition creates a Release PO associated with a Master Blanket Purchase Order (MBPO), which is a COMMBUYS document used to create ordering catalogs for contracts including Statewide Contracts.

To use this functionality the MBPO must be designated RPA Release enabled. Before beginning the requisition, access the MBPO's General tab and verify the RPA Release Enabled field displays a Yes.

APPENDIX A – *Context and Guidance for Using RPA and RPA Release*

Screenshot	Directions
	**Step 1: Launch COMMBUYS** 1. Launch the COMMBUYS website by entering the URL https://www.commbuys.com/bso in the browser. 2. Enter your login credentials and click the **Login** button on the COMMBUYS home page.

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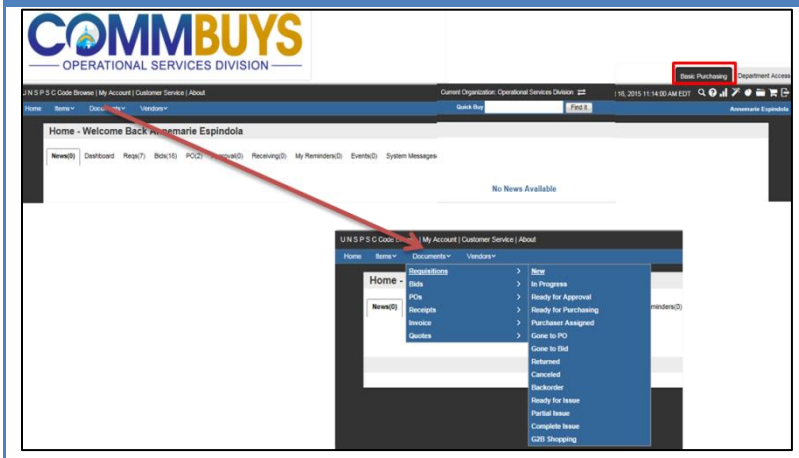
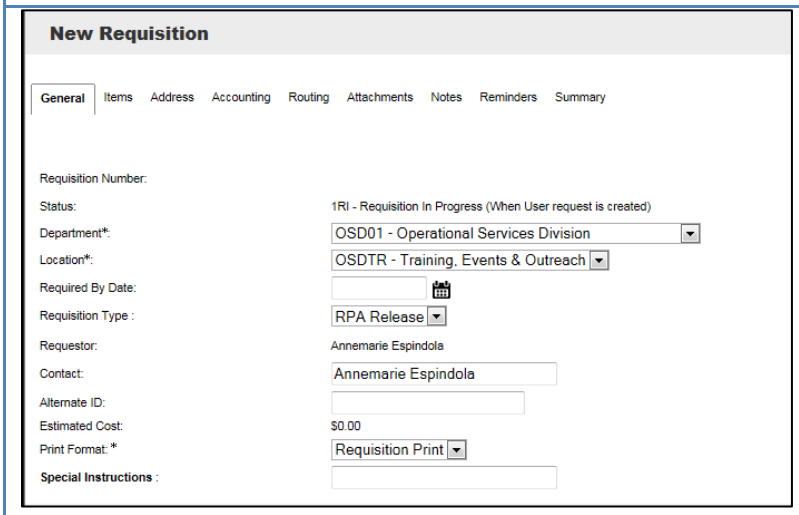
	**Step 3: Start a new Requisition** 1. From the Navigation Bar, select **Documents** > **Requisitions** > **New**
	**Step 4: Enter data in General tab** The General Tab for the requisition opens. On the left side of the screen, complete the following fields: • **Department**: defaults from user profile. May be changed using the dropdown menu if other departments are available to user. • **Location**: defaults from user profile. May be changed using the dropdown menu if other locations are available to user. • **Required by date**: optional • **Requisition Type**: RPA Release • **Requestor**: user that created the requisition; this field cannot be edited. • **Contact**: contact person for this requisition • **Special Instructions**: Enter any instructions for the vendor. These comments will be printed on the P.O. For example, shipping and delivery information. **NOTE:** the text limitation is 1,000 characters.

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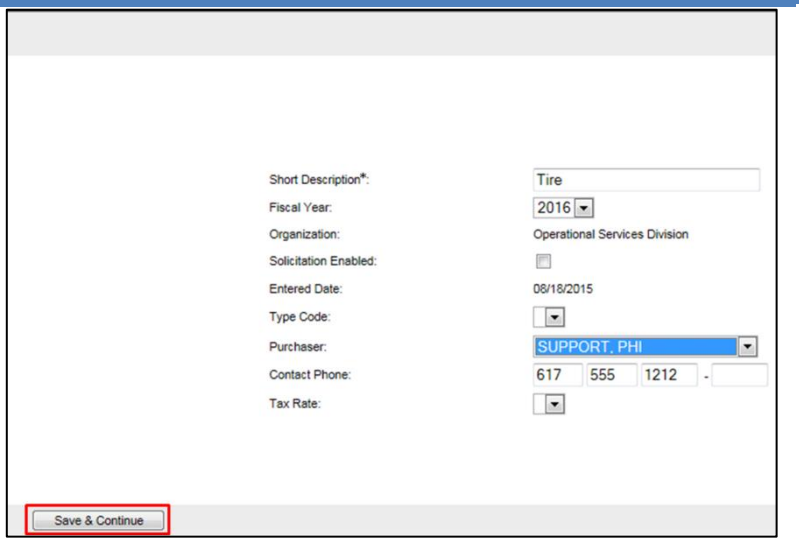
Screenshot	Directions
	**Step 5: Enter data in General tab (Continued)**

1. On the right side of the screen, complete the following fields:
   - **Short Description**: be specific as this field is also used as search criteria to locate a requisition; may use any Departmental Identifier numbers. This field has a limit of sixty characters.
   - **Fiscal Year**: defaults to the current fiscal year.
   - **Organization**: default value based on your user profile and can only be changed by an administrator.
   - **Solicitation Enabled**: leave unchecked
   - **Entered Date**: defaults to current date.
   - **Type Code**: type options are based upon the requisition type. Leave blank.
   - **Purchaser**: defaults to your name; use the dropdown menu to select a different purchaser.
   - **Contact Phone**: defaults to the profile value; can be updated as needed.
   - **Tax Rate**: n/a for Commonwealth. Click **Save & Continue.**
2. Select the **Items** tab.

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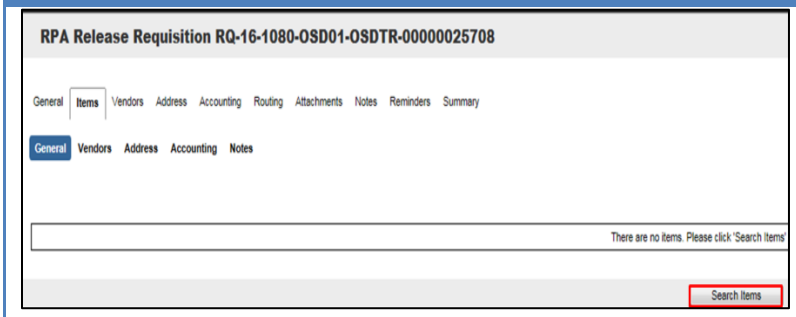
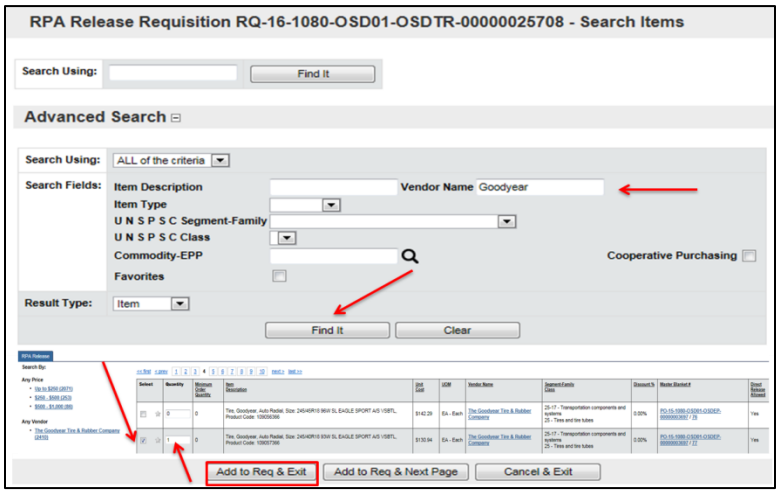
Screenshot	Directions
 	**Step 6: Search for items to add to requisition** 1. The **Items** tab opens. 2. Click the **Search Items** button to begin the process of adding items to the requisition. 3. Click on the **Advanced Search + sign**
	**Step 7: Add items to requisition** 1. Using the **Advanced Search**, enter search criteria to find a good or service 2. Click **Find It** 3. Check the box in the **Select** column next to the item(s) and input the quantity for that item in the **Quantity** column. 4. Click the **Add to Req & Exit** button to return to the **Items** tab

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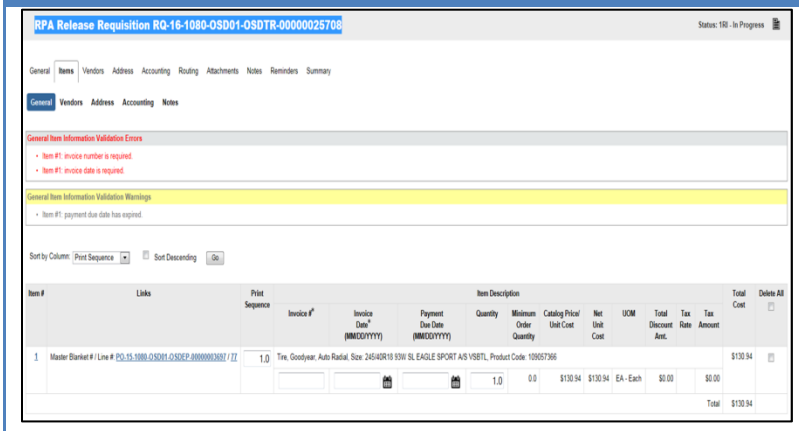
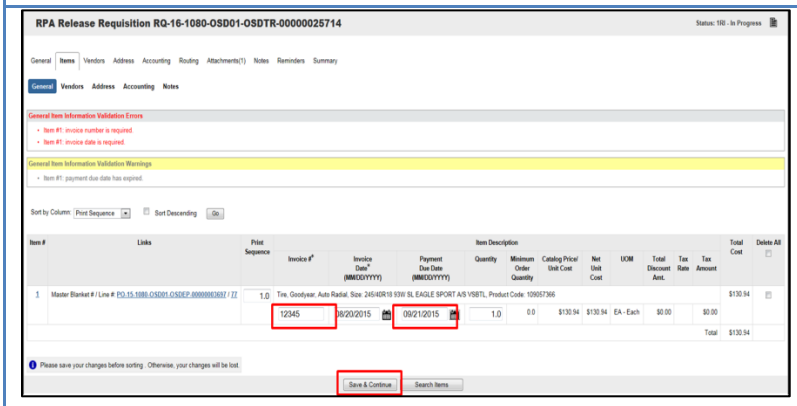
	**Step 8: Review validation errors** 1. You will receive two Validation Errors that need to corrected: • Invoice number is required • Payment due date is required
	**Step 9: Enter invoice information** 1. Enter the invoice number as it appears on the vendor's invoice. 2. Enter the payment due date as it appears on the vendor's invoice. 3. Once complete review the requisition items and invoice information 4. Click the **Save & Continue** button 5. Next, select the **Attachments** tab.
	Step 10: Add attachments 1. The **Attachments** Tab opens. 2. If any files auto-attach: review, keep or delete as necessary. 3. Click the **Add File** button to add a new file such as a scanned copy of the Vendor's invoice. **Note:** The **Add Form** button is not currently a working function in COMMBUYS.

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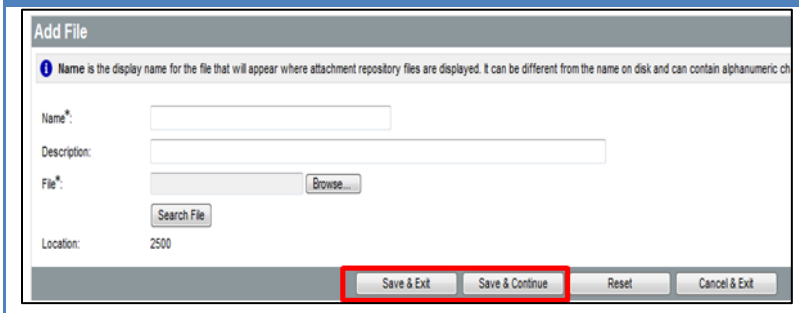
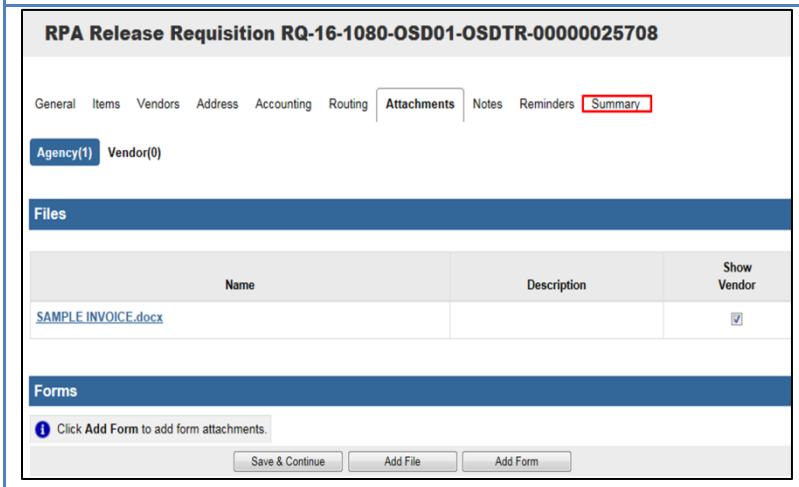
	**Step 11: Choose files to attach** 1. The **Add File** window opens. 2. To select a file from your computer, click the **Browse** button. This will search for documents from your computer. 3. Select the desired file. 4. Complete the following fields: • **Name** – required; but will be populated with the selected file name if left blank • **Description** – optional 5. Click **Save & Exit** to go back to the Attachments tab. From there you can add another file or click **Save & Continue** when all files have been added. **Note:** Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the Repository, click the **Search File** button and complete the advanced search criteria.
	**Step 12: Review Attachments** 1. The **Attachment** tab redisplays with a list of attached files 2. You can opt to disallow the vendor to view the attachments by unchecking the **Show Vendor** box. 3. Next, select the **Summary** tab.

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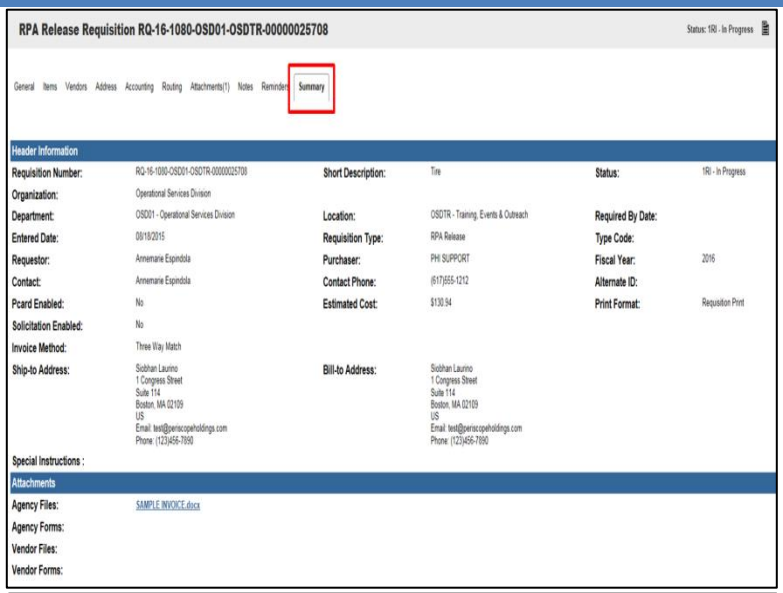
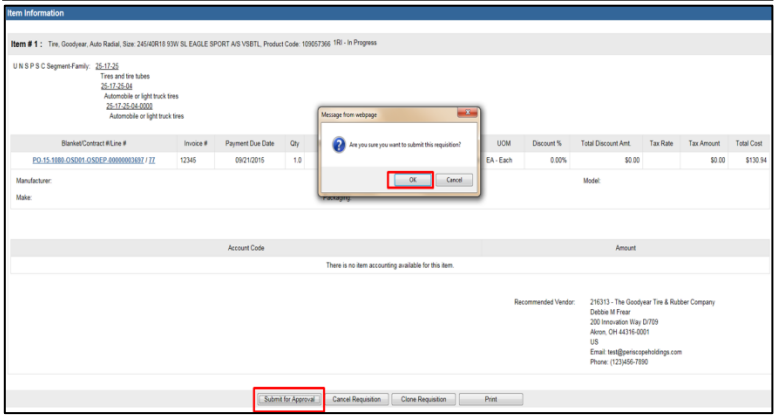
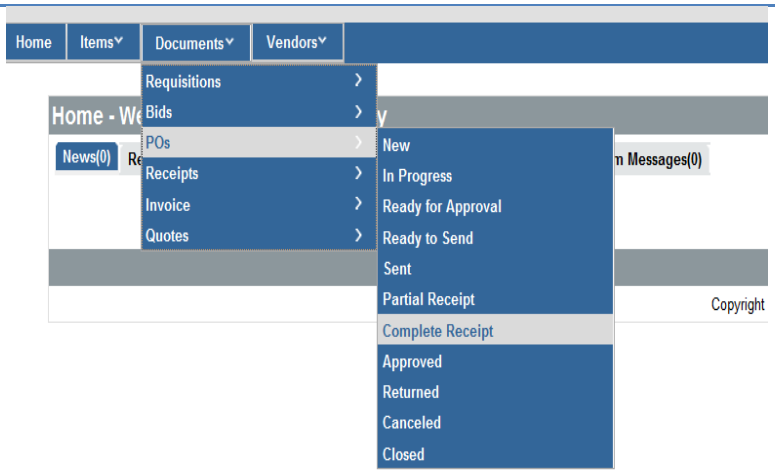
 	**Step 12: Review Summary Tab** 1. Click the **Summary** Tab to view a summary of the nearly completed requisition. 2. Click **Submit for Approval** at the bottom of the page. 3. Click **OK** in the Dialogue Box 4. Once approved, the RPA Release Requisition immediately becomes **completely received Purchase Order** with an **In-Progress Invoice**. Other/optional tabs: • **Routing Tab:** auto-populated, after approval, based on approval workflow • **Notes Tab:** optional • **Reminders Tab:** optional
	**Step 13: Locate the completely received Purchase Order** 1. From the Navigation Bar, select **Documents** > **Purchase Orders** > **Complete Receipt**

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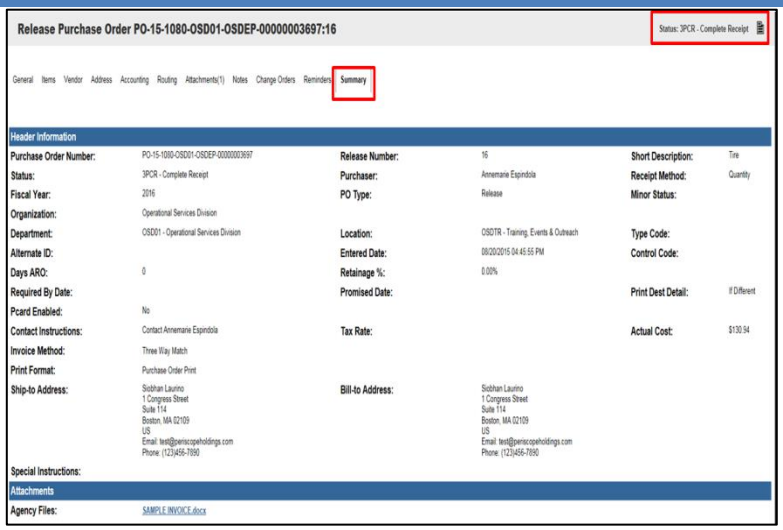

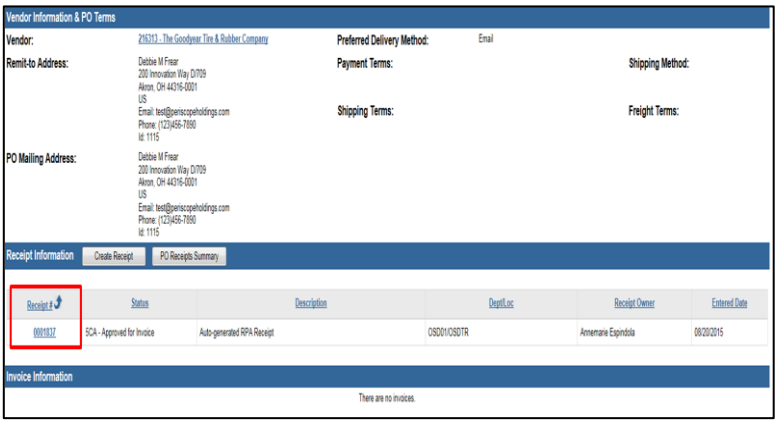

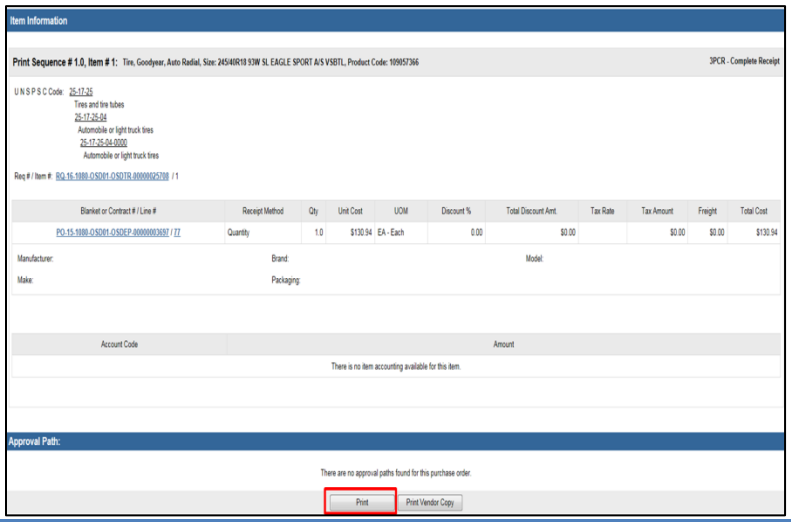

Step 14: Review Summary Tab

1. Click the **Summary** Tab to view a summary of the Purchase Order.
2. Optional: Click the **Print** button at the bottom of the page if you would like to keep a hard copy of this document for your records.

APPENDIX A

Context and Guidance for Using RPA and RPA Release

Recording Purchases through COMMBUYS:

- Agencies should make every attempt to use standard Purchase Orders for mandated COMMBUYS purchases.
- RPAs should be used for exceptional cases – in the event of emergency or when something is not able to be ordered using the standard PO process.
- The availability of RPA Release-enabled Statewide Contract MBPOs will help ensure accurate reporting of contract usage, information crucial to support ongoing improvement to Statewide Contracts and inform future contract and vendor negotiations.

Requisition Type	Description	Business Scenario
RPA Release	Emergency Purchases for items on Statewide Contract	Emergency roadside repairs
RPA Release	Normal PO process to purchase items on Statewide Contract is impractical due to a system or process currently in place	Re-stock of pharmaceuticals
"Open Market" RPA ("RPA" in COMMBUYS)	Emergency purchases for items not on Statewide Contract	Snow melting equipment purchased during a major snowstorm

Statewide Contracts

Statewide Contracts covering goods and services related to exceptional purchasing cases will be updated so that they are RPA Release enabled. The initial list of Statewide Contracts to be RPA Release-enabled includes:

- VEH97- New Tires, Retreads/Retreading and Total Tire Management Program
- OVM08 - Windshield and Glass Replacement for Vehicles
- MED38 - Pharmaceutical Prime Vendor
- MED44 - Reference Laboratory Services
- FAC82 - Hazardous, Medical and Hard-to-Manage Waste Collection, Disposal and Emergency Response